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# Notes and Brief Reports

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## SSI Recipients in Medicaid Institutions, December 1979\*

Of the 4.1 million persons receiving either a Federal supplemental security income (SSI) payment or a federally administered State supplementary payment in December 1979, approximately 226,000 (5.4 percent)<sup>1</sup> resided in medical facilities covered by Medicaid.<sup>2</sup> Since its inception, the SSI program has experienced a modest but continuous growth in the number and proportion of SSI recipients confined to medical facilities covered by title XIX (Medicaid) of the Social Security Act.

Under the provisions of the SSI program, recipients in such medical facilities are limited to a Federal payment standard of \$25 if the Medicaid program pays for 50 percent or more of the cost of their medical services and treatment.<sup>3</sup> This payment standard becomes effective after a full calendar month of residence in a Medicaid institution. The payment is intended to cover personal needs such as clothing, upkeep, personal care, and various items not ordinarily provided through the payment for basic institutional care. The Medicaid program covers the costs of food and shelter in addition to medical treatment and services.

This note provides selected data on the demographic and economic circumstances of those SSI recipients who received federally administered payments and resided in a Medicaid institution at the end of December 1979.

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<sup>1</sup> This number is slightly higher than the figure reported elsewhere for December 1979 because different files were used to obtain the recipient counts. The data for this report were derived from the SSI Management Information Extract File for December 1979. Data in this file exclude individuals who are ineligible for Federal SSI payments and who receive only State-administered State supplementary payments. Few persons in Medicaid facilities receive such payments exclusively.

<sup>2</sup> Such facilities are generally classified as hospitals, skilled-nursing facilities, and intermediate-care facilities.

<sup>3</sup> In December 1979 the other Federal payment standards were \$208.20 for individuals in their "own households" and \$138.80 for individuals living in "another's household."

In addition, it updates previous findings<sup>4</sup> and provides data relevant to some of the Social Welfare Amendments of 1979. The specific legislation of interest here concerns the time extension (from 1 month to 3 months) before the reduced payment standard of \$25 is applied to recipients in Medicaid facilities.<sup>5</sup> The purpose of this extension was to enable recipients entering those facilities either to maintain their household if they expected a short stay or to settle their household affairs if they anticipated a long stay. This note indicates the number of recipients in Medicaid institutions in December 1979 who received a Federal SSI payment based on their previous living arrangement and for whom the reduced payment standard applied in January 1980. As a result of the reduced payment standard, these recipients either received a smaller Federal SSI payment or became ineligible for SSI payments. Two major reasons for termination of SSI payments among the institutionalized population are death and excess income. When the reduced payment standard is applied, recipients may become ineligible because their countable income equals or exceeds the new payment level.

### Eligibility Characteristics

The proportion of disabled recipients and of children was higher among the SSI institutionalized population than among the total SSI population in December 1979. Of the approximately 226,000 recipients in Medicaid facilities during the study month, more than half (59 percent) were disabled, 40 percent were aged, and 1 percent were blind. The majority (87 percent) of recipients were adults; the remaining 13 percent were children, almost all of whom were disabled. Of the total SSI population, 53 percent were disabled, 45 percent were aged, and 2 percent were blind. Children

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<sup>4</sup> Malcolm H. Morrison, **SSI Recipients in Medicaid Institutions, June 1977** (Research and Statistics Note No. 14), Office of Research and Statistics, Office of Policy, Social Security Administration, 1978.

<sup>5</sup> This proposed legislation was not enacted into law in 1980. Similar legislation has been introduced for a number of years and may be reintroduced in the near future.

<sup>6</sup> Data on characteristics of the total population were derived from **Program and Demographic Characteristics of Supplemental Security Beneficiaries, December 1979** (a forthcoming report from the Office of Research and Statistics, Office of Policy, Social Security Administration) and from the 1978 edition of the same report (SSA Publication No. 13-11977).

accounted for only 5 percent of the total SSI population.<sup>6</sup>

### Conversion Status

Institutionalized SSI recipient cases were equally divided between those that were “converted” and “new awards.” The converted cases are those recipients transferred from prior Federal/State assistance programs—old-age assistance (OAA), aid to the blind (AB), and aid to the permanently and totally disabled (APTD)—and “new awards” are those recipients granted assistance after the inception of the SSI program. Among the total SSI population in December 1979, the proportion of converted cases was considerably less—38 percent—than among the institutionalized population. One reason for the disparity may be because conversions are more numerous among the aged and a high proportion of recipients aged 80 and older are institutionalized.

A much higher proportion of blind and disabled recipients were new awards (63 percent) than were the aged (31 percent). All disabled children were new awards since they were ineligible for assistance under the former State APTD program. Blind children, however, did receive assistance in a few States under the former AB program.

### Demographic Characteristics

**Age.** Compared with the total SSI population, the institutionalized population had higher proportions in the older age group and in the younger age group. Twenty-two percent of the SSI recipients in Medicaid institutions were aged 80 and older, compared with 15 percent in the total SSI population. The proportion in the group aged 30 and under was more than twice as large in the institutionalized population—27 percent—as in the total population—13 percent—(table 1).

The elderly, particularly those aged 75 and older, experience the highest incidence of chronic and disabling conditions.<sup>7</sup> Chronic conditions, unlike acute illness, often require long-term care to maintain physical, mental, and social functioning. In the younger age groups, mental disorders predominate. More than 60 percent of the children awarded SSI payments in 1975 had mental disorders, and 9 out of 10 were mentally retarded.<sup>8</sup> Similarly, mental disorder was the most frequent disability among title II (old-age, survivors,

<sup>7</sup> General Accounting Office, *Entering a Nursing Home—Costly Implications for Medicaid and the Elderly*, PAD-80-12, November 26, 1979.

<sup>8</sup> Satya Kochhar, “Blind and Disabled Persons Awarded Federally Administered SSI Payments, 1975,” *Social Security Bulletin*, June 1979.

**Table 1.—Number and percentage distribution of SSI recipients in Medicaid institutions, by sex, age, and reason for eligibility, December 1979**

Sex and age	Total	Aged	Blind and disabled <sup>1</sup>
Total number .....	225,851	89,320	136,531
Men .....	90,424	23,444	66,980
Women .....	135,427	65,876	69,551
Total percent .....	100.0	100.0	100.0
Under 21 .....	13.2	.....	22.0
21-30 .....	13.9	.....	23.0
31-40 .....	5.7	.....	9.4
41-50 .....	4.2	.....	6.9
51-64 .....	14.1	.....	23.3
65-79 .....	27.1	46.1	14.7
80 and over .....	21.7	53.8	.6
Not reported .....	(2)	.1	.....

<sup>1</sup> Eligibility for persons under age 65 is determined on the basis of their disability; once classified as disabled, the classification remains regardless of the recipient's eventual age. Blind and disabled persons applying for SSI at or after age 65, however, are classified as eligible because of age.

<sup>2</sup> Less than 0.05 percent.

and disability insurance—OASDI) disability insurance beneficiaries under age 30.<sup>9</sup> Compared with other disabled persons, those with the mental disorders, particularly the severely retarded, more often require institutionalization because of a limited ability for self-care and a greater need for medical attention.

**Sex.** Of the SSI recipients in Medicaid facilities, 60 percent were women and 40 percent were men. The women were almost equally divided between those eligible because of age and those eligible because of blindness or disability. Among the men, however, almost three times as many were eligible because of blindness or disability as because of age. Men made up 34 percent of the total SSI population and 40 percent of the institutionalized population.

Elderly women predominate among the population in Medicaid facilities as they do in the total SSI population because of differences in life expectancy between men and women. In 1976, men at age 65 were expected to live another 13.7 years; for women it was 18 years. More women reach the upper age ranges where susceptibility to chronic, disabling conditions increases, thereby reducing the ability for self-sufficiency.

### State Distribution

In the majority of States (35), less than 10 percent of the SSI recipients were in Medicaid institutions, although considerable variation existed—from a high of approximately 19 percent in Minnesota and Utah to a low of less than 2 percent in West Virginia (table 2).

<sup>9</sup> Mary Ellen Burdette and Marcia Mohr, *Characteristics of Social Security Disability Insurance Beneficiaries, 1975*, Office of Research and Statistics, Office of Policy, Social Security Administration, SSA Publication No. 13-11947, 1979.

Most States had more disabled recipients than aged recipients in Medicaid facilities; however, the reverse was true in 9 States—Alabama, Florida, Maine, Mississippi, Missouri, New Hampshire, North Dakota, Tennessee, and West Virginia.

Slightly more than half (51 percent) of the SSI recipients in Medicaid facilities resided in the 9 States

that had half the SSI population—California, Illinois, Louisiana, Michigan, New York, Ohio, Oklahoma, Pennsylvania, and Texas. These States accounted for 51 percent of the aged, 50 percent of the blind and disabled adults, and 55 percent of the blind and disabled children in the institutionalized population.

Generally, the southeastern States had relatively low

**Table 2.—Total number of SSI recipients and percent in Medicaid institutions, by reason for eligibility and State, December 1979**

State	Number of SSI recipients				Percent in Medicaid institutions			
	Total	Aged	Blind	Disabled	Total	Aged	Blind	Disabled
Total.....	4,148,931	1,871,343	77,228	2,200,360	5.4	4.8	4.2	6.1
Alabama.....	137,165	79,981	1,898	55,286	3.3	3.8	2.3	2.8
Alaska.....	3,103	1,223	66	1,814	7.4	3.0	6.1	10.4
Arizona <sup>1</sup> .....	29,194	11,862	527	16,805	.....	.....	.....	.....
Arkansas.....	79,440	45,073	1,532	32,835	6.4	4.7	6.7	8.7
California.....	702,127	314,211	17,439	370,477	2.8	2.1	2.7	3.3
Colorado.....	31,449	14,223	354	16,871	10.5	7.8	21.8	12.6
Connecticut.....	23,290	7,626	317	15,347	12.7	1.5	6.3	11.8
Delaware.....	7,064	2,605	171	4,288	7.8	7.1	5.3	8.3
District of Columbia.....	14,847	4,214	200	10,433	3.2	2.7	.....	3.4
Florida.....	167,516	84,286	2,583	80,647	2.1	2.5	1.5	1.7
Georgia.....	155,173	74,053	2,918	78,202	4.7	4.5	3.4	4.9
Hawaii.....	9,967	4,966	148	4,853	5.2	2.7	4.7	7.8
Idaho.....	7,399	2,736	97	4,566	8.2	5.5	6.2	9.8
Illinois.....	122,981	36,782	1,683	84,516	11.3	8.6	7.9	12.5
Indiana.....	41,122	15,657	1,050	24,415	10.7	9.2	8.4	11.7
Iowa.....	25,850	11,576	1,014	13,260	11.3	10.2	6.3	12.7
Kansas.....	20,868	8,520	307	12,041	16.1	9.5	11.4	20.9
Kentucky.....	92,648	43,176	1,997	47,475	3.1	3.4	1.6	3.0
Louisiana.....	138,548	69,024	2,141	67,383	5.7	4.4	5.4	7.1
Maine.....	21,868	10,185	297	11,386	4.0	4.6	2.4	3.6
Maryland.....	48,120	16,349	601	31,170	6.4	7.5	3.8	5.9
Massachusetts.....	128,295	70,593	5,121	52,581	5.7	4.1	3.1	8.2
Michigan.....	116,926	41,012	1,772	74,142	6.7	5.7	4.0	7.3
Minnesota.....	32,823	13,577	632	18,608	19.0	11.7	14.9	24.4
Mississippi.....	112,634	63,692	1,832	47,110	2.3	2.3	2.0	2.2
Missouri.....	86,249	43,372	1,418	41,459	3.6	4.1	3.6	3.1
Montana.....	6,998	2,476	146	4,377	9.8	10.1	9.6	9.6
Nebraska.....	13,716	5,768	249	7,699	13.3	11.8	12.4	14.4
Nevada.....	6,402	3,428	409	2,567	5.4	3.1	1.2	9.2
New Hampshire.....	5,295	2,159	122	3,014	10.7	14.3	8.2	8.2
New Jersey.....	84,106	32,767	1,044	50,295	6.9	5.9	3.3	7.6
New Mexico.....	25,267	10,659	445	14,163	3.2	2.6	6.3	3.5
New York.....	372,779	142,712	4,008	226,059	5.6	6.5	3.0	5.1
North Carolina.....	140,032	65,175	3,236	71,621	2.6	2.4	5.2	2.6
North Dakota.....	6,484	3,435	63	2,986	10.7	12.2	3.2	9.2
Ohio.....	120,118	37,548	2,256	80,314	7.0	9.8	5.6	5.8
Oklahoma.....	69,050	36,241	1,017	31,792	10.8	9.0	6.0	12.9
Oregon.....	22,335	7,667	528	14,140	10.0	6.8	16.5	11.5
Pennsylvania.....	166,174	60,272	3,648	102,254	5.8	7.0	4.1	5.2
Rhode Island.....	15,123	6,088	188	8,847	8.7	7.8	4.8	9.5
South Carolina.....	83,189	39,332	1,876	41,981	3.5	3.2	4.0	3.7
South Dakota.....	7,833	3,852	130	3,851	13.8	10.8	3.1	17.0
Tennessee.....	130,588	63,065	1,886	65,637	3.5	3.9	2.6	3.2
Texas.....	262,793	152,938	4,070	105,785	7.9	6.5	4.2	9.4
Utah.....	7,832	2,503	144	5,185	19.5	10.7	13.2	24.0
Vermont.....	8,941	3,826	119	4,996	6.0	5.1	2.5	6.8
Virginia.....	79,655	35,744	1,387	42,524	5.1	4.1	4.7	5.9
Washington.....	46,686	16,186	541	29,959	8.4	6.2	7.8	9.7
West Virginia.....	41,452	14,588	617	26,247	1.6	2.8	2.4	1.0
Wisconsin.....	67,526	31,501	953	35,072	10.7	6.9	14.5	14.1
Wyoming.....	1,891	839	27	1,025	7.1	7.9	.....	6.6

<sup>1</sup>State does not have a Medicaid program.

percentages of SSI recipients in Medicaid facilities, while the north-central States had much higher percentages. A number of factors may account for these findings. The north-central States had more institutional resources available. They had a greater number of Medicaid beds at long-term care facilities (nursing homes and intermediate care facilities) per 1,000 SSI recipients and expended a larger portion of their Medicaid funds for care in these facilities than did most other States.

For two major reasons, care must be exercised in interpreting these regional differences. In the first place, States with small proportions of recipients in Medicaid facilities may be making greater use of community based services (such as home-health services) funded under titles XVIII or XIX, or homemaker, chore, or health-related services funded under title XX. New York, for example, which had less than 6 percent of its SSI recipients in Medicaid facilities, was responsible for nearly 80 percent of all the home-health expenditures under title XIX in fiscal year 1978.<sup>10</sup>

In the second place, the proportion of SSI recipients with dual entitlements (SSI payments plus social security benefits) entering Medicaid institutions may differ markedly among States. Other factors being constant, States that have high proportions of dual entitlement recipients entering these facilities will generally show low proportions of recipients residing in such facilities. This phenomenon occurs because many dually entitled recipients become ineligible for SSI payments after the first full month of institutionalization as a result of the reduction in the Federal payment standard to \$25. With institutional recipients, SSI payment amounts are determined by deducting countable income from the \$25 maximum. A \$20 disregard is applied to unearned income to obtain countable income. Since social security benefits received by SSI recipients averaged \$172.06 in December 1979, the income of most dually entitled recipients was too high for continued SSI eligibility. Conversely, States with low proportions of dual entitlement recipients entering Medicaid facilities will generally retain much higher percentages of these recipients on their SSI roles.

### Payments

Federally administered payments to SSI recipients in Medicaid institutions totaled \$7.2 million in December 1979. Of this amount, \$6.5 million represented Federal SSI payments and the remaining \$0.7 million was federally administered State supplementation. The distribution of these expenditures, in terms of eligibility categories, followed a pattern similar to that for

<sup>10</sup> Health Care Financing Program Statistics, Preliminary National Medicaid Statistics, Fiscal Year 1978, Health Care Financing Administration, Publication No. (HCFA)-03029, 1980.

recipients: 55 percent to the disabled, 43 percent to the aged, and 2 percent to the blind. More than half (53 percent) of the total SSI payments were awarded to recipients residing in the nine previously mentioned States that had 51 percent of the institutionalized SSI recipients.

The amounts presented above include payments based on the \$25 SSI payment standard as well as some payments based on other living arrangements. The study month included, as would any month, persons who became residents of a Medicaid facility during that month as well as those who had been there longer than a month. Recipients entering during the month receive an SSI payment for that month, including any State supplementation, based on the previous month's living arrangement. SSI recipients institutionalized for longer than a month are eligible for a Federal payment of up to \$25 and are ineligible for any federally administered State supplementation other than retroactive payments or an "essential-person" increment.<sup>11</sup> Thus, almost all of the approximately 10,000 persons who received federally administered State supplemental payments entered Medicaid facilities during the month of December 1979.

A majority of these institutionalized recipients—89 percent—received the maximum \$25 Federal SSI payment; 6 percent received less than \$25. Generally, the latter group received a lower payment because their monthly income from other sources exceeded the standard SSI disregard of \$20 per month. One percent of the recipients received a State supplementary payment but no Federal payment, and 4 percent received a Federal SSI payment greater than \$25 (table 3). Either singularly or in combination, the following reasons may have accounted for receipt of payments that deviated from the \$25 Federal SSI payment standard: The recipient was admitted to the institution during the month, he or she received a retroactive payment, or the recipient's payment included an essential-person increment. Nearly all of the recipients whose SSI payment exceeded the \$25 maximum were scheduled to have their payments terminated or reduced in January 1980. One may thus infer that a substantial proportion probably were recent admissions (table 4).

### Other Income and Resources

Federal SSI payments and/or State supplementary payments were the only source of income for 92 percent of the SSI recipients in Medicaid institutions. Approximately 18,000 institutionalized recipients, or 8 percent, received some type of income in addition to their SSI

<sup>11</sup> Recipients who received an "essential-person" increment before entering the institution may continue to receive this increment during their confinement if their stay is expected to be temporary (that is, 6 months or less).

**Table 3.—Number and percentage distribution of SSI recipients in Medicaid institutions, by amount of Federal SSI payments and federally administered State supplementation, December 1979**

Federally administered State supplementation	Total	Federal SSI			
		None	Less than \$25	\$25	\$26 or more
Number of persons					
Total .....	225,851	2,072	12,895	201,699	9,185
None .....	215,981		12,405	196,736	6,840
Less than \$25 .....	5,219	249	97	4,634	239
\$25 or more .....	4,651	1,823	393	329	2,106
Percentage distribution					
Total .....	100.0	0.9	5.7	89.3	4.1
None .....	95.6		5.5	87.1	3.0
Less than \$25 .....	2.3	.1	( <sup>1</sup> )	2.1	.1
\$25 or more .....	2.1	.8	.2	.1	.9

<sup>1</sup> Less than 0.05 percent.

payments during December 1979. Within this group, 14,000 had unearned income during that month.

As would be expected, only 4 percent of the recipients in Medicaid facilities received social security benefits, compared with 51 percent of all SSI recipients. About 5,700 institutionalized recipients (2.5 percent) received unearned income from other sources such as veterans' compensation and pensions; support from absent parents; employment pensions, rents, interest, and dividends (combined); and payments in cash or in kind for which the source was not available or could not be classified within established codes.

**Table 4.—Number and percentage distribution of SSI recipients in Medicaid institutions, by Federal SSI payments, December 1979 and projected Federal SSI payments, January 1980**

Federal SSI payments, December 1979	Total	Projected Federal SSI payments, January 1980			
		No payment	Less than \$25	\$25	\$26 or more
Number of persons					
Total .....	225,851	10,751	2,448	212,609	43
Less than \$25 .....	14,967	3,336	2,277	9,353	1
\$25 .....	201,699	3,188	92	198,419	
\$26 or more .....	9,185	4,227	79	4,837	42
Percentage distribution					
Total .....	100.0	4.8	1.1	94.1	( <sup>1</sup> )
Less than \$25 .....	100.0	22.3	15.2	62.5	( <sup>1</sup> )
\$25 .....	100.0	1.6	( <sup>1</sup> )	98.4	
\$26 or more .....	100.0	46.0	.9	52.7	.4

<sup>1</sup> Less than 0.1 percent.

**Table 5.—Total number and percentage distribution of SSI recipients in Medicaid institutions receiving Federal SSI payments and other income, by type of income and reason for eligibility, December 1979**

Type of income	Total		Aged		Blind and disabled	
	Number	Percent	Number	Percent	Number	Percent
Total .....	225,851	100.0	89,320	100.0	136,531	100.0
Without income .....	207,722	92.0	81,629	91.4	126,093	92.4
With income <sup>1</sup> .....	18,129	8.0	7,691	8.6	10,438	7.6
Unearned income <sup>2</sup> .....	13,606	6.0	7,454	8.3	6,152	4.5
Social security benefits .....	8,483	3.8	5,359	6.0	3,124	2.3
Other .....	5,704	2.5	2,545	2.8	3,159	2.3
Earned income .....	4,809	2.1	278	.3	4,531	3.3

<sup>1</sup> Represents persons with earned or unearned income from one or more sources.

<sup>2</sup> Represents persons with unearned income from one or more sources who may also have earned income. Persons receiving social security benefits and income from other sources are counted in both categories.

Earned income was received by 2 percent of the institutionalized recipients, compared with 3 percent of the total SSI population. Institutionalized recipients with such income were probably new arrivals to Medicaid facilities who had previously been employed. Their earnings averaged \$38 per month. As shown in table 5, a greater proportion of the blind and disabled had earnings (3.3 percent) than did the aged (0.3 percent).

Resources such as homes, life insurance, automobiles, and income-producing property were owned by 5 percent of the institutionalized recipients. Because of the greater time span in which income and possessions could be acquired, a higher proportion of the aged had resources (10 percent) than did the blind and disabled (3 percent). The proportion of homeowners was higher among the aged than among the blind and disabled; the proportion of automobile owners, however, was higher among the disabled than among the aged. These differences in ownership patterns may be attributable to differences in age.

## Representative Payees

SSI payments may either be made directly to the recipient or to a representative payee. An institution or a relative are the payees most frequently appointed. Representative payees are appointed when recipients are considered incapable of managing their payments. Such recipients include children under age 18, drug addicts, alcoholics, and the severely retarded. The duties and responsibilities of representative payees are similar to those of court-appointed guardians. They may be required to furnish periodic statements on the use of the recipient's funds and information on contacts with the recipient.

**Table 6.**—Number and percentage distribution of SSI recipients in Medicaid institutions, by payee status, December 1979

Payee status	Number	Percentage distribution
Total.....	225,851	100.0
Receiving direct payments .....	80,681	35.7
With representative payee .....	145,168	64.3
Institution .....	100,438	44.5
Relative .....	32,972	14.6
Social agency or public official.....	6,540	2.9
Other.....	186	.1
Not specified.....	5,032	2.2
Not reported.....	2	(1)

<sup>1</sup>Less than 0.1 percent.

In December 1979, SSI payments were made to representative payees on behalf of 64 percent of the institutionalized recipients. The majority of these representative payees (45 percent) were institutions and about 15 percent were relatives (table 6). A much higher proportion of representative payees was appointed for the SSI institutionalized population than for the total SSI population. In December 1978, representative payees had been designated for only 17 percent of the total SSI population. An increase in the proportion of institutionalized SSI recipients with representative payees has occurred since June 1977, when 59 percent had such payees. This increase may be due in part to the increasing number of disabled SSI recipients in Medicaid facilities. According to a recent study, representative payees are more frequently appointed for the disabled than for the blind or aged.<sup>12</sup>

### Continuation of Previous Payment Level

If previous payment levels were extended for 3 full months as cited in the Social Welfare Amendments of 1979, many new residents would have continued to receive their previous payment amounts through February 1980. Unfortunately, the number of residents who would have been affected by this extension cannot be derived directly from the data file because the date of institutionalization is not available. An estimate of the number of new residents, however, can be obtained by comparing the data elements on a resident's current monthly payment amount (December 1979) with that expected for the following month (January 1980). New residents would most frequently be found among those whose payments were expected to decrease or terminate in January 1980 because of the reduction in SSI payments after a month of institutionalization.

<sup>12</sup> See Satya Kochhar, **Representative Payments Under the SSI Program, August 1977** (Research and Statistics Note No. 9), Office of Research and Statistics, Office of Policy, Social Security Administration, 1980.

**Table 7.**—Number of SSI recipients in Medicaid institutions in December 1979 who were scheduled for payment reductions or terminations in January 1980, by projected payment status, January 1980

Projected payment status, January 1980	SSI recipients in Medicaid institutions, December 1979				
	Total	With income			Without income
		Total	OASDI	Other than OASDI	
Total .....	225,851	18,129	8,483	9,646	207,722
With payment changes:					
Total .....	15,759	7,991	7,238	753	7,768
Terminated.....	10,751	7,632	7,184	448	3,119
Reduced .....	5,008	359	54	305	4,648
With SSI payments of \$25 or less:					
Total .....	6,616	3,927	3,605	322	2,689
Terminated.....	6,524	3,841	3,573	268	2,683
Reduced .....	92	86	32	54	6
With SSI payments of \$26 or more:					
Total .....	9,143	4,064	3,633	431	5,079
Terminated.....	4,227	3,791	3,611	180	436
Reduced .....	4,916	273	22	251	4,643

Within this group, the legislation would mainly affect those residents who in December 1979 either received payments in excess of \$25—a little more than 9,000—or received payments of \$25 or less but had other sources of income—approximately 4,000 (table 7). Of course, payment reductions and terminations may result from factors other than new residency. Among them are the recipient's death, cessation of payments to an essential person, a build-up of resources resulting from saving SSI payments, previous overpayments, or cessation of retroactive payments. These factors probably caused the January 1980 payment reductions and terminations experienced by residents who in December 1979 received SSI payments of \$25 or less and were without other sources of income.

If previous payment levels continued for 3 months, a relatively high proportion of SSI recipients who were also social security beneficiaries would remain on the SSI rolls. Approximately 7,200 or 85 percent of the recipients who received social security benefits in December were scheduled for payment terminations in January. Although some of these terminations may have occurred for other reasons, many can be assumed to have resulted from excess income.

If previous payment levels continued for 3 months, proportionally fewer recipients who received income from sources other than social security benefits in December would be affected. Only 753 (8 percent) of these residents were scheduled for payment reductions or terminations in January. Their payment levels may have been affected less because their income may have

**(Continued on page 47)**

**Table M-9.—OASDI cash benefits: Monthly benefits in current-payment status, by program, 1940–80**

[Data contain some duplication arising from dual entitlement; see the 1977-79 Annual Statistical Supplement, p. 11]

At end of selected month	Number			Amount (in thousands)		
	Total	OASI <sup>1</sup>	DI <sup>2</sup>	Total	OASI <sup>1</sup>	DI <sup>2</sup>
December:						
1940.....	222,488	222,488	.....	\$4,070	\$4,070	.....
1945.....	1,288,107	1,288,107	.....	23,801	23,801	.....
1950.....	3,477,243	3,477,243	.....	126,856	126,856	.....
1955.....	7,960,616	7,960,616	.....	411,613	411,613	.....
1960.....	14,844,589	14,157,138	687,451	936,321	888,320	\$48,000
1965.....	20,866,767	19,127,716	1,739,051	1,516,802	1,395,817	120,986
1970.....	26,228,629	23,563,634	2,664,995	2,628,326	2,385,926	242,400
1971.....	27,291,508	24,361,500	2,930,008	3,058,957	2,763,022	295,934
1972.....	28,476,028	25,204,542	3,271,486	3,916,203	3,514,741	401,462
1973.....	29,868,145	26,309,163	3,558,982	4,269,863	3,821,165	448,698
1974.....	30,852,817	26,941,483	3,911,334	5,001,918	4,445,170	556,748
1975.....	32,084,511	27,732,311	4,352,200	5,727,758	5,047,656	680,102
1976.....	33,023,552	28,399,725	4,623,827	6,415,103	5,624,858	790,246
1977.....	34,082,556	29,228,350	4,854,206	7,175,513	6,270,000	905,513
1978.....	34,586,771	29,718,195	4,868,576	7,930,576	6,933,292	997,284
1979.....	35,125,066	30,347,848	4,777,218	9,056,622	7,950,300	1,106,322
1980.....	35,618,840	30,936,668	4,682,172	10,694,022	9,432,299	1,261,723
1979						
December.....	35,125,066	30,347,848	4,777,218	9,056,622	7,950,300	1,106,322
1980						
January.....	35,180,555	30,418,448	4,762,107	9,091,626	7,986,984	1,104,642
February.....	35,251,563	30,484,978	4,766,585	9,119,949	8,014,056	1,105,893
March.....	35,235,589	30,465,844	4,769,745	9,118,244	8,011,205	1,107,040
April.....	35,267,320	30,493,317	4,774,003	9,132,288	8,023,731	1,108,557
May.....	35,295,311	30,523,440	4,771,871	9,146,826	8,038,060	1,108,766
June.....	35,219,898	30,486,358	4,733,540	10,463,626	9,198,633	1,264,993
July.....	35,145,511	30,454,178	4,691,333	10,466,156	9,206,376	1,259,780
August.....	35,299,089	30,601,127	4,697,962	10,527,343	9,266,137	1,261,206
September.....	35,427,897	30,727,955	4,699,942	10,580,546	9,318,427	1,262,120
October.....	35,554,302	30,850,353	4,703,949	10,633,557	9,369,681	1,263,875
November.....	35,598,465	30,907,520	4,690,945	10,667,266	9,404,720	1,262,545
December.....	35,618,840	30,936,668	4,682,172	10,694,022	9,432,299	1,261,723

<sup>1</sup> Benefits paid from the OASI trust fund to retired workers and their dependents and to all survivors. Includes special benefits authorized by 1966 legislation for persons aged 72 and over not insured under the regular or

transitional provisions of the Social Security Act.

<sup>2</sup> Benefits paid from the DI trust fund to disabled workers and their dependents.

**SSI Recipients (Continued from page 37)**

been relatively small or derived from earnings that ceased with institutionalization.

**Summary**

In December 1979, 5 percent of all SSI recipients received care in Medicaid facilities. Most States had less than 10 percent of their SSI recipients in Medicaid institutions.

The characteristics of the institutionalized SSI population were as follows:

- 59 percent were disabled persons, 40 percent were aged persons, and 1 percent were blind persons;

- 87 percent were adults;
- half were aged 65 and older;
- 60 percent were women;
- more more than half were residents of 9 States;
- 89 percent were in receipt of the maximum \$25 SSI payment;
- 8 percent had other sources of income; and
- two-thirds had representative payees.

Compared with the total SSI population, the SSI institutionalized population contained higher proportions of men, disabled persons, recipients aged 80 and older, and converted cases.